

COUDERSPORT AREA SCHOOL DISTRICT, PENNSYLVANIA

**Request for Qualifications (RFQ)
for an Energy Savings Performance Contracting Project**

DATE: SEPTEMBER 15, 2021

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Coudersport Area School District, Pennsylvania

I. PURPOSE OF SOLICITATION

Background: The intent of this Request for Qualifications (RFQ) is to solicit qualifications from Energy Services Companies (ESCOs). Coudersport Area School District is requesting qualifications from Energy Services Companies (ESCOs) for the implementation of Facility and Energy Efficiency Improvements on a Performance Contracting basis that is in accordance with Pennsylvania Act 77 of 2004, Act 39 of 2010, Act 163 of 2016 the Guaranteed Energy Savings Act.

For the purpose of this RFQ, “ESCO” refers to any company that is qualified to provide a turnkey energy conservation program that includes all services listed in this RFQ. Responses to this RFQ shall describe the ESCO’s capability to identify the need for, design, install, maintain, monitor, and arrange the financing of a comprehensive energy conservation program.

Coudersport Area School District intends to use this RFQ to qualify and select a firm to conduct an Investment Grade Audit and award contract(s) to perform cost-effective energy conservation retrofits.

Deadline: Responses to this RFQ must be received by 12:00 PM on Friday, October 6, 2021 at the address below. Three (3) paper copies and one (1) electronic copy of the response must be sealed and delivered to:

Coudersport Area School District
698 Dwight Street
Coudersport, PA 16915

Re: Qualifications Enclosed – Guaranteed Energy Savings Project
ATTN: Drew Kyle, Superintendent

Please Note:

Coudersport Area School District reserves the right to reject as non-responsive any responses which do not contain the information requested in Section VII and Appendix A of this RFQ.

- Additionally, Coudersport Area School District reserves the right to reject as non-responsive any responses which are not organized and formatted as described in this RFQ.
- Coudersport Area School District reserves the right to reject any and all responses resulting from this RFQ. Late responses will not be accepted and will be returned to the submitting company unopened.
- Coudersport Area School District is not liable for any cost incurred by any person or firm responding to this RFQ.

Questions: All questions will be answered by email to all bidders. Any and all questions regarding this RFQ and the program it represents must be submitted in writing to:

Drew Kyle, Superintendent

Email: dkyle@coudyschools.org

Coudersport Area School District, Pennsylvania

II. BACKGROUND

Coudersport Area School District: The Coudersport Area School District is a small, rural, public school district which covers the Borough of Coudersport and southern and western portions of Allegany Township, Eulalia Township, Hebron Township, Homer Township, Summit Township and Sweden Township in Potter County, Pennsylvania. Coudersport Area School District encompasses approximately 214 square miles. According to the 2010 census the district's population is approximately 5,692 people.

Coudersport Area School District operates two schools; Coudersport ASD Jr/Sr High School (7th–12th) and Coudersport ASD Elementary School (K–6th).

III. SERVICES REQUESTED

For this RFQ, Coudersport Area School District is interested in Energy Services Companies (ESCOs) for the identification, engineering, design, installation, training, maintenance and financing of approved Energy Conservation Measures (ECMs) in a fixed cost scenario for the Coudersport Area School District buildings.

All ECMs considered shall be proven, commercially available and result in verifiable energy savings.

All equipment provided by the ESCO for this program shall have a history of successful operating experience in similar installations and shall be in new and unused condition. This equipment shall be of the newest generation with readily available replacement parts. All equipment used for this program shall be approved by Coudersport Area School District prior to installation.

IV. SELECTION PROCESS

RFQ Qualifications Evaluation

Interested ESCOs responding to this RFQ with a response must provide the information requested in Section VII and Appendix A. Coudersport Area School District will evaluate submittals and choose an ESCO who meets the qualifications of this RFQ to develop an Investment Grade Audit.

Engineering Proposal

Upon completion of the response evaluation, Coudersport Area School District will select an ESCO to conduct an Investment Grade Audit. When approved by Coudersport Area School District, the IGA (Investment Grade Audit) will allow the ESCO to proceed with the energy analysis, feasibility study, conceptual engineering design and permitting plan for a comprehensive energy conservation program.

The ESCO will develop a program that meets Coudersport Area School District's requirements. Coudersport Area School District and the ESCO will sign the agreement, thereby authorizing the ESCO to proceed.

Negotiating and Signing of Contract

Upon completion of the Investment Grade Audit and the determination that the project is feasible and acceptable to Coudersport Area School District, an Energy Savings Performance Contracting (ESPC) Agreement will be drawn up between Coudersport Area School District and the ESCO. All engineering, design and permitting cost incurred by the ESCO under the Investment Grade Audit will be incorporated into the ESPC Agreement. Upon acceptance of the ESPC Agreement by the Organization's Administration, the ESPC Agreement will be signed and the program will commence.

Coudersport Area School District, Pennsylvania

V. SCHEDULE OF EVENTS

The following time frame is expected to be followed during the procurement period of this RFQ. This is a tentative schedule, and dates are subject to change.

- o Release of RFQ – September 15, 2021
- o RFQ response received – October 6, 2021 @ 12:00 P.M.
- o Invitation to Selected ESCO to develop Investment Grade Audit – October 11, 2021

Please note that responses to this RFQ must be received no later than October 6, 2021 @ 12:00 P.M. at the address below. Three (3) hard copies and one (1) electronic copy of the response must be delivered to:

Coudersport Area School District
698 Dwight Street
Coudersport, PA 16915
Re: Qualifications Enclosed – Guaranteed Energy Savings Project
ATTN: Drew Kyle, Superintendent

VI. SELECTION CRITERIA

Qualification of all business entities that respond to this solicitation will be evaluated using the following selection criteria.

Organization & Supplemental Information

- Submission conforms to the requirements of this solicitation.
- Supplemental information is pertinent to the goals and objectives of this procurement.

Personnel Qualifications

- Quality of personnel assigned to this project and degree of pertinent experience.

Project Plan

- Comprehensiveness and rationale of the ESCO's project management plan.
- Method employed to establish baseline energy use in individual buildings and facility-wide
- Method of measurement and verification used to demonstrate energy use reduction and cost savings as guaranteed
- Explain your engineering methodology of selecting equipment
- Your financial plan demonstrates your ability to help meet our needs and goals

Prior Project Performance

- Experience with implementing the project plan you are recommending for Coudersport Area School District.
- Experience taking responsibility for the full range of roles contemplated for this project (e.g. identification and analysis of ECMs, design, installation, operation, training, financing, savings verification, etc.)
- References from prior and current clients.

Business and Financial Qualifications

- Business unit dedicated to providing guaranteed energy savings programs.
- Business unit dedicated to ensuring project performance
- Years in business
- Financial viability of entity proposed to provide technical and financial guarantees
- NAESCO Accreditation
- ESCO corporate headquarters must reside within the 50 United States

VII. RESPONSE FORMAT AND COMMENTS

Responses must be submitted in the format outlined in this section. Each response will be reviewed to determine if it is complete prior to actual evaluation. Coudersport Area School District reserves the right to eliminate from further consideration any response which is deemed to be substantially or materially unresponsive to the requests for information contained in this section. The intent of the Owner is that all responses follow the same format in order to evaluate each respondent fairly.

Each Respondent will provide the Owner three (3) copies of the RFQ response and one (1) electronic copy.

A) TABLE OF CONTENTS:

- Responses shall include a Table of Contents properly indicating the appropriate sections.

B) EXECUTIVE SUMMARY:

- Responses shall include a concise abstract of no more than three (3) pages stating the respondent's understanding of the owner's goals and objectives. The ESCO's submission should identify unique qualifications and capabilities for this project that satisfy these goals and objectives.

C) COMPANY BACKGROUND:

- 1) Company Information / History of Organization
- 2) Provide verification of corporate headquarters residing within the 50 United States
- 3) Provide NAESCO accreditation
- 4) Project Organization Chart
- 5) Resumes of Individuals that will be working on the Coudersport Area School District project
- 6) Contractor Profile Form – Attachment A

D) COMPANY EXPERIENCE:

- 1) Provide a minimum of at least 5 references of Energy Savings Programs your organization has completed. All References will be contacted. Provide the owner's name, address, telephone number and contact person for each reference. Only references for projects which are complete through the installation of all equipment and systems are acceptable
- 2) Provide Case Studies of at least 5 projects you have completed. Case Study information shall include project costs, scope of work, and savings associated with the project.

E) FINANCIAL APPROACH

1. Provide a detailed description on your firm's possible arrangements for financing of this project – what bank(s) are involved, responsibilities of each party and any special conditions associated with financing this project.
2. Provide a detailed description of the type of financial guarantees that can be offered through your organization and what is typically used by your organization. Specifically what methodologies, technologies, etc. are used to create baselines and overall savings objectives and reporting of the guarantee? What sorts of guarantees (IPMVP: A, B, C, D) are offered by your company and what will you recommend to Coudersport Area School District? Provide sample bonding form and bonding limits.

F) SOLUTION DEVELOPMENT PROCESS

- Responses shall include your organization's solution development process. How will you audit the facilities and develop your solutions. At what level will Coudersport Area School District be involved in the selection of measures? What is your process of forecasting future costs and how does that affect the guarantee?

G) PROJECT MANAGEMENT

- Responses shall include your organizations approach to project management. Specifically explain your ability to overcome obstacles and keep the project on-time. Explain your methodology of communicating with the client. How does your firm handle warranty issues? Provide a description of the services to be performed by full-time employees of the ESCO, i.e. which services are self-performed vs. contracted.

H) LEGAL DOCUMENTS

- Provide a sample contract for both the project and the annual guarantee.

I) ON-GOING SUPPORT AND SERVICES

- 1) What ongoing services can your firm provide?** List no less than five (5) Pennsylvania School District ESCO references to indicate the service quality of the responding firm. In the event your firm doesn't provide ongoing services, how do you propose handling warranty issues or service needs? Each reference shall demonstrate local facility service and repair experience. Provide the owners name, address, telephone number, and contact person for each reference.
- 2) Customer Satisfaction:** Describe the type of ongoing customer satisfaction reports available to the owner. Provide a sample report with owners name, address, telephone number and contact person. The owner may be contacted to verify accuracies.
- 3) Environmental Services:** Describe your ability to provide professional environmental services, specifically in regard to Indoor Air Quality and Energy Star Certification.
- 4) Training:** Describe the type of training available to the Owner.
- 5) Energy Auditing Services:** Describe how you would perform an energy audit. Provide a sample audit.

ATTACHMENT A

Energy Contractor Profile Form

In paragraph format, please include the following information in the order it is requested (This attachment is not intended to be used as a form).

A. OVERVIEW OF FIRM

- 1. Firm Name, Business Address, City, State, District, Zip Code**
- 2. Names and titles of two contact people**
- 3. Outline your Company History**
- 4. What is your firm's Core Business? (as described in Business Journals).**
- 5. If your firm manufactures/distributes a product (such as chillers, HVAC equipment, facility controls, etc.) and such products are being recommended on this project, will you consider other manufacturers?**
 - Describe a prior Guaranteed Energy Savings Program you have implemented and where this has occurred.**
 - Describe the evaluation and bidding process used**
 - Were the bidding tabulation sheets shared with the Owner?**
- 6. Provide any corporate background on misconduct. Provide a list of all projects nationally where there was a criminal investigation, indictment or a conviction relating to the conduct of a performance contract. This includes officers and representatives of the company as well as public officials connected with the project.**
- 7. Provide an explanation if a dispute with a client has ever gone to arbitration or litigation over a Guaranteed Energy Savings Agreement. What was the outcome?**
- 8. Federal Employee Identification Number**
- 9. Are you willing to provide an on-site tour of your firm?**